

# Revenue Wise Business Development Assessment

Use this assessment to determine how you compare to other successful attorneys and what's needed to grow your book of business.



**REVENUE WISE**

THE SMART WAY TO GROW

Copyright © 2019

Version 1.7b

# Start Here

## Getting Started

**The first step** in becoming a better business developer is to assess where you are starting from. By completing the assessment on the following pages, you will learn what you have in place, what you know and what's missing. This will give you a quick snapshot of what it will take to improve.

## “What Are You Solving for?”

In all my consulting assignments, I always begin by asking “what are we solving for?” This ensures we are clear on what we want to accomplish.

**I am going to assume you want to accomplish the following:**

- ▶ You want to grow a larger, more sustainable book of business.
- ▶ You want to generate stimulating, enjoyable work with clients you like.
- ▶ You want to build your brand as a “Recognized Expert” in your practice specialty.

## Why Don't You Have What You Want?

Based on my 20 years of experience coaching and training more than 2000 attorneys across the United States in business development, I can safely say that if you don't have the above results in the quantity, quality or at the pace you want them, then you have gaps in one or more of these areas:

- ▶ **Do you know what to do?** There are specific elements you need to develop and proven skills you need to learn, if you are going to succeed.
- ▶ **Are you willing to do what is required?** You need to be willing to make the necessary investment in time, effort, and getting outside your comfort zone.
- ▶ **Are you actually doing it?** This is the “foot-work” stage. You need to complete the deliverables, learn the skills, develop the habits and do the things that lead to success.
- ▶ **Are you doing it well?** When you execute, you need to be effective. This requires testing, practicing and fine-tuning your approach.
- ▶ **Do you need help?** All top performers have coaches, mentors or make extensive use of the best practices found in self-study training materials.

**To find out if you need help, complete the assessment below.**

# Your Results & Activities

Your Financial Results	Status >	Yes/No
<b>Relative Performance.</b> In my “class” (e.g. equity partner, income partner, associate) to the extent it is possible at my firm, I know that my originations are in the top 50%.		
<b>My Own Clients.</b> Over 75% of my work comes from my own clients, that I originated.		
<b>Hit Originations.</b> For each of the last two years, I set and achieved origination goals that were higher than my previous year’s results.		
<b>Make Hours.</b> I have met or exceeded my billable hours target in each of the last two years.		
	Score	

Your Performance	Status >	Yes/No
<b>Win Pitches.</b> On average, I win at least half of my pitches/proposals/RFPs.		
<b>Visibility &amp; Credibility.</b> I have built a “personal brand” that distinguishes me from the other attorneys in my chosen field. This brand awareness generates regular referrals.		
<b>Ideal Clients.</b> The majority of my clients are of the type and size I like, give me good and stimulating work and are enjoyable to work with.		
<b>Happy Clients.</b> The majority of my clients would say I do excellent legal work, deliver great results and would be happy to refer me to their friends and colleagues.		
	Score	

Your Activities	Status >	Yes/No
<b>A Bias for Action.</b> No matter how busy I am, I make time to do business development.		
<b>Meet New Contacts.</b> I participate in activities where I meet at least two-to-four new prospective clients or referral sources per month.		
<b>Nurture Contacts.</b> I conduct at least two “high-value” business development activities each week. (E.g. speak, meal, in-depth phone call, attend event, send content, etc.)		
<b>Nurture Best Clients.</b> At least monthly, I contact my best clients and do something of “extra value” for them at no charge. These contacts are outside of my ongoing/typical work communications.		
<b>Maintain Contact List.</b> I maintain a list of my best clients and contacts, noting what has transpired, what I need to do next and when.		
<b>Make LinkedIn Connections.</b> I make at least two LinkedIn connections per week.		
<b>Post Online Content.</b> I post at least one piece of content on LinkedIn or some other online platform each month.		
<b>Give Presentations.</b> I give at least two presentations a year (either in-house or at a conference or event).		
	Score	

# Your Practice & Skills

Your Practice	Status >	Yes/No
<b>Practice Focus.</b> I have defined a clear practice focus. I have selected a target client/industry, determined their true needs and problems, and defined a service that solves these needs in a way that is superior to my competitors.		
<b>Business Development Plan.</b> Each year, I develop a biz dev plan that details my goals, financial targets and the tactics that will help me achieve them.		
<b>Verbal Business Card.</b> I have developed an authentic and memorable response to the question “what do you do?”		
<b>LinkedIn Profile.</b> I have a comprehensive LinkedIn profile that showcases my practice focus and most significant skills.		
<b>LinkedIn Connections.</b> I have invited all my appropriate contacts to connect with me on LinkedIn.		
	Score	

Your Skills	Status >	Yes/No
<b>Sales/Pitch Process.</b> I have learned a formal, consultative sales process that I use for one-on-one sales meetings and formal pitch meetings. I am effective at leading these meetings.		
<b>Verbal Business Card Delivery.</b> When I deliver my Verbal Business Card to prospective clients I make a good impression and often end up exchanging physical business cards.		
<b>Attend Conferences.</b> I get the most from conferences and events. I know what to do before, during, and after to get the most value from attending.		
<b>Networking Events.</b> I learned how to effectively participate in networking events. While I may not like attending, I have learned how cultivate new relationships and advance existing ones.		
<b>Presentation Marketing.</b> I have developed a “Signature Talk” (presentation) that showcases my unique expertise and skills. I know how to use this talk to generate new prospects, convert existing ones and grow clients.		
	Score	

# Understanding Your Score

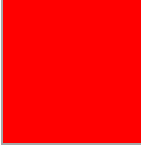
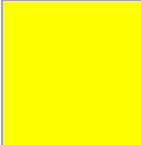
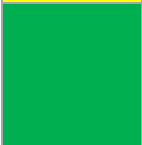
## Ratings by Section

Your Financial Results	
------------------------	--

Section	Section Rating
Your Performance	
Your Activities	
Your Practice	
Your Skills	
Biz Dev Rating	

## Interpreting Your Score

The table above will give a snapshot of how you are doing in each area and where you need to improve.

Level	Explanation
	A red score indicates you are deficient in this area and need to improve.
	A yellow score indicates you are doing okay, but there is room for improvement.
	A green score indicates you are doing well in this area.

# David Adams Biography



David Adams is a seasoned coach, author and speaker. He has more than 20 years of experience helping attorneys and firm leaders improve their business development and leadership skills. David is an expert at helping lawyers and practice groups develop the attitudes, behaviors, and capabilities necessary for success.

He helps attorneys achieve the ideal combination of professional success and personal fulfillment.

As the founder of Revenue Wise, David has worked with hundreds of lawyers, at all levels of seniority, at such firms as Orrick, Herrington & Sutcliffe; Polsinelli; Locke Lord; Fenwick & West; Latham & Watkins; Littler Mendelson; Kilpatrick Townsend & Stockton; Holland & Hart; Kecker, Van Nest & Peters; and Farella Braun + Martel.

As a coach, consultant and trainer, David is focused on producing measurable results and helping lawyers overcome the internal and external obstacles to success in business development. Many firms have adopted the Revenue Wise approach to business development.

David works with practice groups to refocus their efforts, reposition them in the marketplace, formulate effective plans, promote teamwork among leaders and members, and create systems of accountability that help them achieve their objectives.

David also works with firm management and leaders to develop effective growth strategies and plans, implement cross-selling programs, develop the next generation of leaders, help the management committee work more effectively together and facilitate effective retreats and meetings.

David Adams  
415.302.3900  
[David@revenuewise.com](mailto:David@revenuewise.com)

Revenue Wise, Inc.  
1000 Fourth Street, Suite 595  
San Rafael, CA 94901  
[www.revenuewise.com](http://www.revenuewise.com)